



Creating Delivery and Task Orders

February 27, 2001

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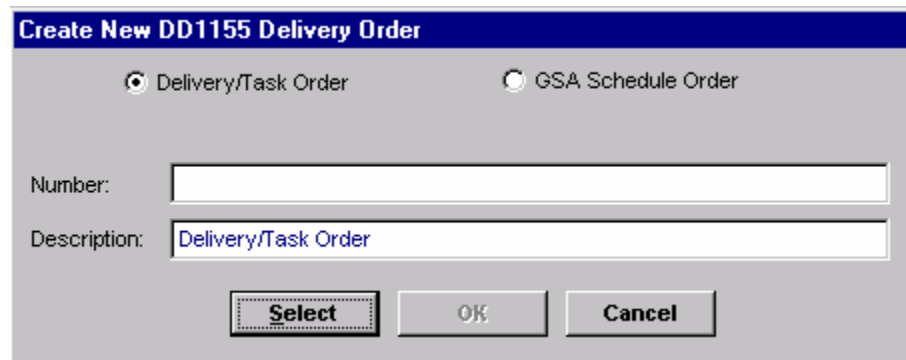
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1. Creating Delivery/Task Orders

In order to create a Delivery Order (DO) or Task Order (TO) the following two documents that must be created are the Purchase Request (PR) and base contract. Delivery and Task Orders (**DO/TO**) may be created off of either the base contract or the Purchase Request (**PR**), but both are required to complete the final **DD 1155** or **SF 1449 DO/TO**.

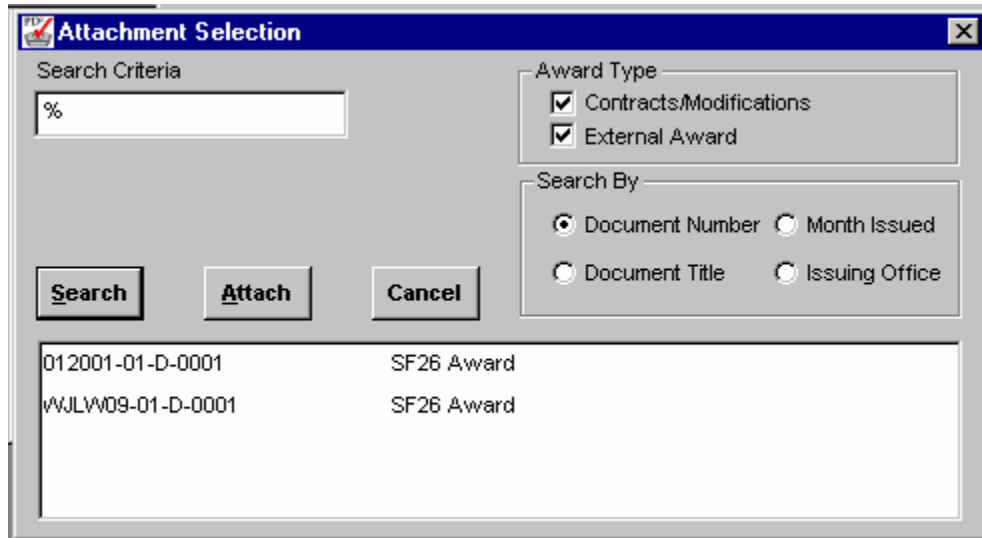
1.1 Creating a DO/TO from the Purchase Request

Highlight the appropriate **PR** and select **Procurement → Post-Award → FSS Order/DO/TO (DD Form 1155) or Commercial FSS Order/DO/TO (SF1449)**. When the **Create New DD 1155 Delivery Order** or **Create New SF 1449 Delivery Order** window opens the **Number** field is empty.



Select the **Delivery/Task Order** radio button and enter a new description in the **Description** field if necessary.

Note that the **[Select]** button at the bottom of the box is enabled. Click the **[Select]** button to search for and select the contract from which to build the **DO/TO** number. The **Number** field is not editable, so the document number may not be typed in this field. After clicking the **[Select]** button, search for the contract to be associated with this **DO/TO**.

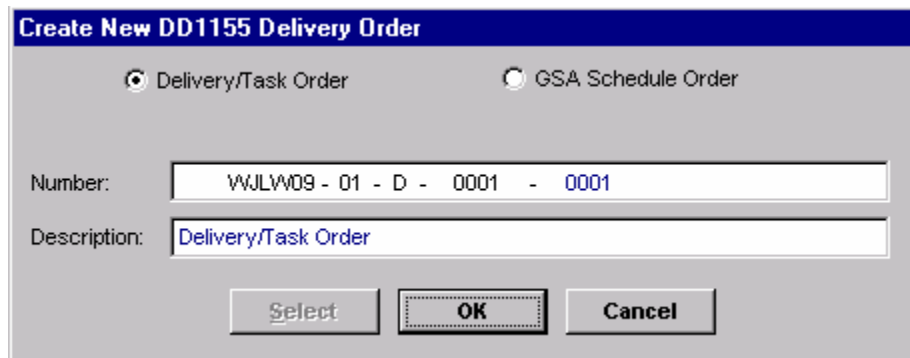


The **Attachment Selection** dialog box contains the following elements:

- Search Criteria:** A text field containing the character "%".
- Award Type:** Two checked checkboxes: ☒ Contracts/Modifications and ☒ External Award.
- Search By:** Four radio buttons: ☒ Document Number, ☐ Month Issued, ☐ Document Title, and ☐ Issuing Office.
- Buttons:** Search, Attach, and Cancel.
- Results List:**

012001-01-D-0001	SF26 Award
WJLW09-01-D-0001	SF26 Award

Once contract number appears in the **Attachment Selection** window, highlight it and click the **[Attach]** button. The **Number** field is automatically updates with the **DO/TO** number. The four-digit SPIIN in the **Number** block is editable, but the 13-digit PIIN is not.



The **Create New DD1155 Delivery Order** dialog box contains the following elements:

- Order Type:** Two radio buttons: ☒ Delivery/Task Order and ☐ GSA Schedule Order.
- Number:** A text field containing "WJLW09 - 01 - D - 0001 - 0001".
- Description:** A text field containing "Delivery/Task Order".
- Buttons:** Select, OK, and Cancel.

Click **[OK]** to accept the **DO/TO** number.

The **Delivery/Task Order** window opens. This window is more often referred to as the **Matchmaker** window. In this window, the CLINs on the **PR** are matched with the CLINs on the contract. To match CLINs, highlight the CLIN on each side of the window. The “equals” sign indicates that they are matched. To erase the “equals” sign, double-click on it. The quantity on the right side of **Delivery/Task Order** window is editable.

Contract

WJLW09-01-D-0001
SF26 Award

Award / Contract

Min Qty Min \$ Amt
Max Qty Max \$ Amt

CLIN #	Description	Type	Remaining Quantity	Unit Cost	Remaining Cost
0001	pens	FFP	2,000	1.00	

Delivery/Task Order

WJLW09-01-D-0001-0001
Delivery/Task Order

Delivery Order

Min Qty Min \$ Amt
Max Qty Max \$ Amt

CLIN #	Description	Type	Quantity	Cost	CLIN Price
0001	pens	FFP	2,000	2,000.00	

Report OK Cancel Attach

After completing the matching process, click [OK]. The DO/TO will automatically populate **Line Item Detail** with line item information from the attached PR and the associated contract.

Enter the **Date of Order/Call** and click through each tab. The **DD 1155 DO/TO** contains 25 fields to review, whereas the **SF 1449** contains 27 fields. Review all fields to ensure that the information entered is correct. Edit and adjust any information as necessary.

Note: Do not forget to select the **Funds Available** checkbox to certify that funds are available, even if the DO/TO is not funded. The DO/TO will not release if this checkbox is not selected.

After reviewing the tabs, generate the CLINs and the document. Select **Document Options → Generate CLINs** to generate the CLINs. After the prompt displays that the CLINs have been built, select **Document Options → Generate Document**. Once the document is generated, save and close the DO/TO.

To approve and release the DO/TO, highlight the **DD 1155** or **SF 1449 DO/TO** and click the red checkmark on the tool bar. Select the appropriate approval template, and approve

the document. In order to route the document to someone else for his/her approval, highlight the document and click on the mail slot button on the tool bar.

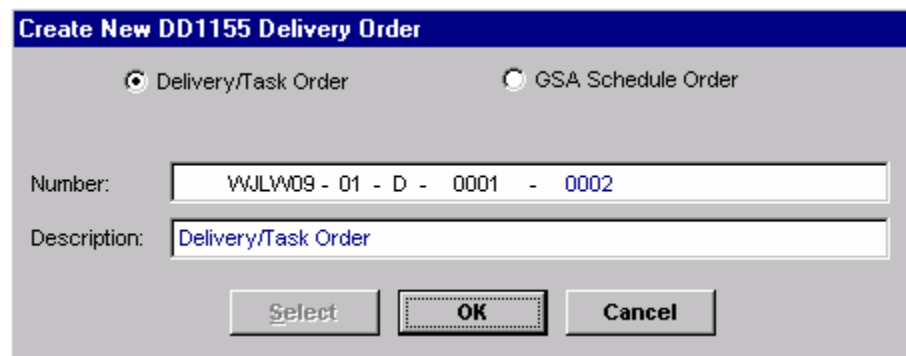
Designate the appropriate people to approve the **DO/TO**, and route it to them.

Once the **DD 1155** or **SF 1449 DO/TO** has been fully approved, release the document by selecting **Procurement → Pre-Award/Award → Awards → Release Award**.

Note: Release the **DO/TO** under the **Award** menu, not the **Post-Award** menu. There is no option to release a **DO/TO** under the **Post-Award** menu.

1.2 Creating a DO/TO from a Released Award

Highlight the released award and select **Procurement → Post-Award → FSS Order/DO/TO (DD Form 1155)** or **Commercial FSS Order/DO/TO (SF 1449)**. The **Create New DD 1155 Delivery Order** window opens.



The document number of the **DO/TO** displays in the **Number** field. (Note: the **[Select]** button is grayed-out, because the contract has already been selected). Select the **Delivery/Task Order** radio button and enter a description in the **Description** field. Click **[OK]**.

The **Delivery/Task Order** window opens. Only the CLINs from the contract display on the left side. In order to match the CLINs, CLINs from the **PR** must display on the right side of the **Delivery/Task Order** window. To list the **PR** CLINs, click the **[Attach]** button at the bottom right hand corner of the window.

Contract
 vWJLV10-01-D-0001
 SF2E Award
 Award / Contract
 Min Qty Min \$ Amt
 Max Qty Max \$ Amt

CLIN # **Description** **Type**

Remaining Quantity	Unit Cost	Remaining Cost
0001	paper	FFP
25,000	1.00	

Delivery/Task Order
 vWJLV10-01-D-0001-0001
 Delivery/Task Order
 Delivery Order
 Min Qty Min \$ Amt
 Max Qty Max \$ Amt

CLIN # **Description** **Type**

Quantity	Cost	CLIN Price
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Enter the search criteria of the **PR** in the **Search Criteria** field of the **PR** to be associated with this document. Once the **PR** displays in the **Attachment Selection** window, click the **[Select]** button.

Attachment Selection

Search Criteria

Document Type

Search By
☒ Document Number ☐ Month Issued
☐ Document Title ☐ Issuing Office


Search **Select** **Cancel**

012501B	Tile Purchase Request
012501C	Door Knob Purchase Request
vJLW07	Purchase Request

The **Delivery/Task Order** window opens with the **PR** information on the right side of the window. To attach more than one **PR** to a **DO/TO**, click the **[Attach]** button, search for the next **PR**, highlight it and click the **[Select]** button. This will add the CLINs from the **PR** to the right side of the **Delivery/Task Order** window.

Delivery/Task Order


Contract

 vJLW10-01-D-0001
SF26 Award

Award / Contract

Min Qty Min \$ Amt
Max Qty Max \$ Amt

Delivery/Task Order

 vJLW10-01-D-0001-0001
Delivery/Task Order

Delivery Order

Min Qty Min \$ Amt
Max Qty Max \$ Amt

CLIN #	Description	Type
0001	paper	FFP
	25,000	1.00

CLIN #	Description	Type
0002	paper	FFP
	25000	25,000.00

Report **OK** **Cancel** **Attach**

In the **Delivery/Task Order** window, match the CLINs on the **PR** with the CLINs on the contract. To match CLINs, highlight the CLIN on each side of the window. The “equals”

sign indicates that they are matched. To erase the “equals” sign, double-click on it. The quantity on the right side of the **Delivery/Task Order** window is editable.

After matching CLINs in the **Delivery/Task Order** window, click **[OK]**. The **DO/TO** will automatically populate **Line Item Detail** with line item information from the attached **PR** and contract.

Enter in the **Date of Order/Call** and go through each of the tabs. The **DD 1155** contains 25 fields to review, whereas the **SF 1449** contains 27 fields to review. Review all fields to confirm that the information entered is correct. Edit and adjust any information as necessary.

Note: Do not forget to select the **Funds Available** checkbox to certify that funds are available. The document will not release if this box is not selected.

After reviewing the tabs, generate the CLINs and the document. Select **Document Options → Generate CLINs** to generate the CLINs. After the prompt displays that the CLINs have been built, select **Document Options → Generate Document**. Once the document is generated, save and close the **DO/TO**.

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Once the **DD 1155** or **SF 1449 DO/TO** has been fully approved, release the document by selecting **Procurement → Pre-Award/Award → Awards → Release Award**.

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